

DFA DIALOGUE

2021-2022 Annual Report

Vol. XXXV

2021-2022 Annual General Meeting

Thursday, May 19, 2022

2:00 pm – 3:30 pm

Held via Zoom

During the AGM, refer to this report, along with the attached agenda and documents.
Voting on motions will take place via zoom polling.

Territorial Acknowledgement

The DFA is located in Mi'kma'ki, the unceded territory of the Mi'kmaq people.

DFA wants to hear from you!

Contact DFA anytime to ask questions, provide feedback, or get involved.

Please contact us via email at dfa@dal.ca or phone 902 494 3722.

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Member site: dfa.ns.ca Public site: WeAreDal.ca

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DFA Dialogue 2021-2022 Annual Report

Table of Contents

President's Report	3
Grievance Committee	6
Dalhousie Employee Benefits Advisory Committee	9
Dalhousie Pension Advisory Committee	11
Dalhousie Pension Trust Fund/Retirees' Trust Fund	13
Association-Board Committee	15
Dalhousie Environmental Health & Safety Committee	19
Dalhousie Transportation and Security Committee	19
President's Advisory Committee on Sexualized Violence	21
Dalhousie Council on Employment Equity	21
DFA Equity Committee	22
DFA Communications Co-ordination Committee	26
DFA Indigenous Caucus Committee	27
Southern African Student Education Project	30
WUSC Student Refugee Program	32
2022-2023 DFA Executive Committee	33
CAUT Dedicated Service Awards	34
Celebrating 33 Years of Service!	35

President's Report

Tara Perrot (Science), President, 2021-2022



It's difficult to believe that my time as DFA President is nearing an end. The last two years as President-Elect and President have provided a level of insight into the relationship between the DFA and the Administration that could only be afforded by being on the inside. I have a much better understanding of the workings of the DFA and the importance of our Collective Agreement. I also gained an even stronger appreciation for the resiliency of our membership.

Many of the issues we dealt with over the last year were directly tied to challenges coming out of the public health emergency that resulted from the global pandemic. The pandemic brought unique challenges for the DFA as we tried to keep our members safe and negotiate what we thought was necessary to do that. These weren't always easy decisions and I thank the members of the **Executive Committee** for their unwavering service as we navigated mainly uncharted waters over the last year.

Gratitude

You've all received emails from the DFA and some of you have sought out advice or help. You recognize the names of the staff but many of you I suspect have no idea how important these people are to the daily operation of the DFA, how dedicated they are to serving the membership, and how professionally they conduct themselves. We are all indebted to **Barbara MacLennan, Kristin Hoyt, Lynn Purves, and Catherine Wall**. I also want to extend a very warm welcome to **Jack Brown**, who joined the team at the beginning of April as our new Professional Officer to learn the ropes from Barbara as she prepares to retire after serving the Association and our members for 33 years (*Please see the last page of this report for a recognition of Barbara's contribution to the DFA.*) You can be assured that your interests are being served daily by this amazing staff.

In addition to staff, the DFA is served by Members who volunteer their time and talent. There are many roles required to maintain operations, so please take a moment to look over the lists of committee members noted at the start of each report. These are your colleagues, maybe even people in your own unit, who give their time to represent the Membership – thanks to each of you. Special thanks to those who chaired the DFA standing committees this past year - it was a pleasure working with you.

A very big thanks to **Tim Juckes** (Psychology and Neuroscience), who served as the co-Chair for the Association-Board Committee (ABC), a very time-consuming but extremely important role, in addition to serving on the Grievance Committee and being willing to once again be part of the Bargaining Team.

Finally, I want to thank **David Westwood** (Health and Human Performance) for the many roles he played this past year (Past President, President-Elect, Chair of Grievance Committee, Pension Advisory

Committee representative, ABC nominee), and for always being willing to share his experience and insight.

Highlights

The fall brought a return to classes but not a return to normalcy. Despite the continuing health restrictions, however, life went on and the DFA took advantage of the virtual platform to engage members in matters of importance. On September 30, 2021 the DFA hosted a virtual event as part of the 2021 National Day for Truth and Reconciliation. **Patti Doyle-Bedwell** (Open Learning and Career Development), a member of our Executive Committee and Bargaining Team, presented a personal and moving account of her experiences as an Indigenous woman, daughter of a residential school survivor and expert in the area of Indigenous law, education and human rights.

It was a pleasure to serve as ex-officio member of the Equity committee, chaired by **Remi Agu** (Pharmacy). Members of this committee are engaged and prepared to move forward with important initiatives (see Equity Committee Report, p. 22). Some of the challenges inherent in being a racialized person working at Dalhousie were clearly articulated during the May 11, 2022 **Being a Black Professor at Dalhousie University** that was part of our DFA Public Speaker Series. Thanks to **Remi Agu**, **Dominic Silvio** (Killam Library) and **Barbara Hamilton-Hinch** (Assistant Vice-Provost Equity and Inclusion) for participating in the panel.

The Communications Coordination Committee, chaired by **Amy Birchall** (Veterinary Tech), worked hard this past year to revamp the DFA website, vastly improving the site for use by members while also making it more accessible for the public. I encourage you to check it out if you haven't done so recently.

Finally, I want to highlight the work of the **Bargaining Team**, who came together regularly, often in the evenings, from January through March to iron out a set of proposals to take to the table. Members include: Chief Negotiator **David Wallbridge** (Pink Larkin), **Tim Jukes**, **Patti Doyle-Bedwell**, **Shelley McKibbon** (Kellogg Library), **Katherine Fierlbeck** (Political Science), **Stefanie Colombo** (Animal Science and Aquaculture) and DFA staff members **Barbara MacLennan** and **Lynn Purves**.

Challenges

Post-secondary education is facing numerous challenges across the country. As CAUT President, Brenda Austin-Smith summarized at the **2022 Robert S. Rodger Lecture** in April, the recent challenges faced by higher education institutions to ratify collective agreements with decent monetary proposals are inextricably linked to the lack of federal funding of post-secondary education (PSE). Joining Brenda was Orvie Dingwall, President of University of Manitoba Faculty Association (UMFA), who shared UMFA's experience bargaining, mobilizing Members and striking during the pandemic.

This has been a record year for job action at academic institutions from coast to coast, exposing the fragile foundation for PSE. The DFA stood in solidarity with these other institutions, doing as much as we could by attending local rallies, picketing alongside those in other provinces as 'flying pickets' and through financial donations. The Finance Committee, chaired by **Mark Lewis** (Law Library), stayed on top

of the situation, recommending donations to support strike action as necessary. At writing of this report, the Executive Committee approved a total of \$13,000 for striking faculty associations.

One of the biggest challenges we faced this past year with respect to pandemic-related issues was the refusal of the Board to consult in any meaningful way prior to making decisions that had important implications for our members. This resulted in more than one grievance being filed and the Grievance Committee, chaired by **David Westwood** (see Grievance Report on p.6 to learn more), was hard at work. This lack of consultation is a symptom of a larger problem –academic administrations’ progressive disregard for the process of collegial governance. Our voices are not being respected and as a result, our ability to meaningfully contribute to decisions surrounding our working conditions is being slowly eroded. I encourage each and every one of you to demand that your voice be heard. Keep up with issues that are before Senate and don’t hesitate to talk to your Senators about issues that are of importance to you. Speak up at Faculty council meetings and unit-level committees, and demand that proceedings are open, with in-camera deliberations used only when necessary. I know that these tasks take up time that we may feel we don’t have but it is our collective responsibility to ensure that our voices are heard.

The pandemic also made it clear how little control our Members have over working conditions (see the Grievance Committee report on p.6 to learn more). Increased workloads and pivots in mode of course delivery were routine over the last two years and some of that we presume will go away post-pandemic. However, now that the can of worms that is ‘on-line instruction’ has been opened for many more classes than ever before, it can’t be closed. And maybe it shouldn’t be. The key will be ensuring that professors and instructors have the choice of mode of course delivery. As for workload, the Administration will always try to do more with less. Members need to take a stand when asked to do extra work. Those who take a stand shouldn’t be seen as not being team players – they should be seen as sending the message that the team does not have enough members.

As we enter another round of bargaining, I want to say a few things as someone that went through the last round as President-Elect. You can count on having a solid Bargaining Team led by a prepared Chief Negotiator. You can also likely count on this round being tough, possibly as tough as the last round. We always work diligently to avoid job action but if we can’t, please get involved and stay engaged. We have a lot to lose, not only for ourselves, but for our ability to continue to attract high quality academic staff in the future.

In conclusion, it has been an honour to represent our hard-working members during these last two years. I was continually impressed that members did what was needed to keep the academic mission moving along, working longer than normal hours to learn new ways to teach, skipping vacation to ensure students had what they needed to complete degrees, all amid the consequences for our personal lives that came along with lock-downs and health restrictions. It has not been an easy two years for any of us and I am well aware of the exhaustion at this juncture. I urge you to rejuvenate by prioritizing deferred vacation time prior to the fall term. I leave you in excellent hands with David Westwood as President for 2022-23.

DFA

Grievance Committee

David Westwood (Health) Chair, Catrina Brown (Health), Patti-Doyle Bedwell (Open Learning and Career Development), Katherine Fierlbeck (FASS), Tim Juckes (Science), Matthew Numer (Health), Tara Perrot (Science), Dominic Silvio (Libraries), Barbara MacLennan (DFA Professional Officer), and Jack Brown (DFA Professional Officer effective April 4, 2022)

There are three stages to the grievance process under the Collective Agreement (Article 29). The grievor and DFA Professional Officer are involved at every stage of the process, and a grievance officer is assigned to each case. This year, we have paired up a senior grievance officer with a junior grievance officer for each case to help with training.

The first stage (“informal”) is initiated if a resolution cannot be reached outside of grievance procedures and the Chair of the Committee believes the facts of a case might constitute a violation of the Collective Agreement. It is worth noting that the DFA spends considerable time working with aggrieved Members to help find resolutions to problems, and most of these cases do not reach the informal grievance stage. At the informal stage, a letter is sent to the decision-maker (often the Dean of the involved Faculty, or at times the Provost) and a meeting is held where the facts of the case are presented and the decision-maker provides a written response. If the issue remains unresolved at this stage, the DFA Grievance Committee meets to review the case and decide whether to proceed to the second stage (“formal grievance”), engage in further discussion at the informal stage, or withdraw the grievance.

The formal stage requires a written description of the facts of the case and the relevant articles of the Collective Agreement in addition to a remedy. A meeting is held with the President of the DFA and the President of the University, and a written response is provided with a decision. If the case remains unresolved, the Grievance Committee meets to decide whether to proceed to the final stage (“arbitration”), continue discussions at the formal stage, or withdraw the case. If the case is recommended for arbitration, then the DFA Executive Committee has the final decision because of the potential impact on finances and the rest of the bargaining unit. Typically, an external legal opinion is sought to help inform decision-making at this stage. If the case proceeds to arbitration, then the decision of an arbitrator is final, and binding. Oftentimes resolutions are found before the arbitration commences.

DESCRIPTION OF CASES FOR 2021-2022

COVID-19 Memorandum – Working Conditions

This case was triggered by a memorandum from the Provost in the fall of 2021, announcing plans for a wholesale return to on-campus activities in the winter term. The DFA launched a grievance at the Provost level because the decision was made and announced without adequately consulting the DFA despite the dramatic changes to working conditions (Article 19). The grievance advanced to the formal stage, and the President recommended that further meetings continue with the Provost given Dr. Harvey’s decision-making authority for academic matters related to COVID-19. We continued to have

meetings through the fall and winter semesters as additional memoranda were issued announcing various changes to COVID-19 protocols. In a way, these meetings began to be the place where consultation took place. We continued to press for meaningful consultation on decisions that affect DFA Members' working conditions but we continued to receive minimal notice and cursory consultation at best.

Inappropriate Appointments Process – Reappointment of a Limited-Term Instructor Member

The affected Member was approaching the end of their contract and applied for a posting for a new limited-term appointment in the same unit. The Member had been given assurances that they would likely be reappointed, and there had been no indications of concerns about performance during the current contract. The Member was short-listed, interviewed, and subsequently recommended for reappointment by the committee. The Member subsequently received a letter from the Dean indicating that the search was cancelled, citing a change in academic direction. A decision of this kind at this stage of the appointments process is highly irregular. An informal grievance was launched at the Dean level and documents were requested. It became clear that there were additional issues happening in the background that had nothing to do with academic matters, and that were not previously brought to the Member's attention. The case proceeded to the formal stage. After some negotiation, a financial settlement was reached that the Member found acceptable.

Inadequate Consultation

The DFA President was sent a draft memorandum about changes to COVID-19 protocols at the end of one business day and asked to provide feedback in less than 24 hours. In previous conversations arising from a separate and on-going grievance about working conditions and consultations, the DFA had made it clear that a minimum of four business days was required to permit the DFA to provide feedback about memoranda of this kind. A grievance was launched at the Provost level. The case is currently at the informal stage where we hope to impress upon the Provost that meaningful consultation requires more than a few hours of advance notice about decisions that have already been made. In a positive development arising from the case, the Provost gave the DFA two-weeks' notice of a planned memorandum about the campus mask mandate, which provided us sufficient time and opportunity to consult with DFA Members using a brief on-line survey.

Vacation Pay in Lieu of Vacation Time

The Professor Member decided in the fall semester to retire before the end of the winter semester. The Member did not have sufficient time or opportunity to take the full 30 days of vacation entitlement, and of course could not request to have the vacation carried forward which is possible under the Collective Agreement (Article 30). Although there is no express provision in the Collective Agreement for vacation time to be paid out to Members of the professoriate, the Member argued that they were effectively losing a benefit entitlement. A grievance was initiated at the Dean level, and at the time of writing we are awaiting a written response from the informal stage meeting.

Harassment Investigation

A number of DFA Members filed personal harassment claims against the Dean of the Faculty alleging a variety of behaviours and actions that they found inappropriate and harmful. An external investigator was appointed. The investigator was not acceptable to the Members because the person was a known management-side lawyer and the Members did not believe their concerns would be fairly heard and adjudicated. A previous grievance about the appointment of the investigator was withdrawn *without prejudice* as Members were keen to have the investigation proceed in a timely manner. After an unacceptably long delay, the investigator completed the investigation and issued a report that effectively dismissed all of the concerns, arguing that the Members were given appropriate managerial direction. The Members believe that the investigator did not understand the norms of collegial governance, and gave far too much latitude to the Dean's desire to implement radical change in the face of legitimate objections raised by academic staff. A grievance was filed at the Provost level, and the grievance was denied. At the time of writing, a formal grievance notice was being prepared.

LOU on Integration of Canada Pension Plan Enhancements

In the 2020-2022 bargaining round the DFA agreed in principle to integrate Dalhousie Pension Plan Benefits with newly enhanced benefits under the Canada Pension Plan. The matter was to be referred to the Pension Advisory Committee who would recommend an accrual formula to the parties that would reflect this integration – in a nutshell, the total pension benefits from the Dalhousie and Canada Pension Plans would remain roughly the same, subject to some irreconcilable differences in the provisions of the two plans. The arrangement would result in reduced contributions to the Dalhousie Pension Plan and the savings were to be shared by the parties. In ongoing discussions at a subcommittee of the Pension Advisory Committee (PAC) the two DFA representatives reminded the Board representatives on several occasions that the parties did not agree to equal (50/50) sharing of the savings, but that this was to be discussed at PAC along with the accrual formula. Seven planned meetings of the subcommittee of PAC were suddenly cancelled and the Board gave notice of a grievance against the DFA with regard to this matter. At the time of writing, we await the scheduling of a meeting at the informal stage.

Designated Groups

This case went to arbitration in 2020-2021, and is held in abeyance for one year while the DFA and Board work through a joint committee to see if a resolution can be reached about the application of the fourth "Principle of Fair Consideration" for the appointments process. Details of the case have been described previously. The Committee has met only once during the current year for a variety of reasons related to scheduling and personnel changes. **DFA**

Dalhousie Employee Benefits Advisory Committee

Remi Agu (Health) and Darren Abramson (FASS), DFA Representatives

The committee is made up of 12 voting members from the following employee and employer groups: DFA (two reps), NSGEU Local 77 (two reps), NSGEU Local 99 (one rep), DPMG (one rep), University Senate (one rep) and University (five reps) appointed by the Board of Governors.

The committee meets approximately six times throughout the year. Committee members use their experience to provide ideas, guidance, and feedback to effectively administer the plan. Major objectives of the committee are to:

- develop health strategies (e.g., wellness);
- ensure the plan is attractive and competitive compared to relevant Canadian employers;
- promote employee knowledge of plan selections and cost management; and
- provide consistent benefit coverage across all employee groups, as feasible.

The committee oversees the administration of employee benefits including Group Life Benefits, Survivor Income Benefits (SIB), Long-Term Disability, Major Medical Insurance, Health Travel Coverage, Dental Plan, Accidental Death and Dismemberment, Optional Life Insurance, and Voluntary Personal Accidental Insurance.

This year, the committee was chaired by Jenny White, Dalhousie Human Resources.

SOME NUMBERS

Health

There was a \$1.5M deficit this year between what was contributed vs what was paid out in claims.

Paramedical claims nearly doubled this year, particularly on mental health services, showing plan members are using the services. The enhanced mental health benefit implementation coincided with the pandemic so rates will be subsidized this year to see how the mental health benefit plays out after the pandemic is over.

There was a 14% increase in drug claims this year. Zejula, a new cancer drug, saw nearly \$150K in claims this year; there was also a 16% increase in antidepressant drug claims.

Dental

Our dental plan performed on budget, but the Nova Scotia dental fee guide is increasing by 7% this year. Due to our strong reserves, we can bring the premium rate increase down to 3%.

Life

This year, we paid more into the plan than we paid out so the renewal rate is decreasing by 3.8%. We did, however, have four life claims in January 2022, which may result in an increase to life rates next renewal. Life premiums are 100% employer paid so rate changes have no impact on plan members.

Long Term Disability

There were 23 new LTD claimants this year and 15 claimants were removed, so there is a net increase in claimants this year over last year and we are seeing people stay on LTD for longer. The increase in LTD claims is related to:

- cancer - Nova Scotia's health care system is behind in identifying and diagnosing cancer claims, so we are expecting to see an increase in these claims again next year.
- musculoskeletal claims - working from home under improvised work spaces is starting to take a toll on people's bodies.

Mental health claims have decreased slightly from 11 to 10 this year.

Travel

Claims for travel were down significantly due to pandemic travel restrictions, so there will be a 20% rate decrease.

GROUP INSURANCE RENEWAL RATE CHANGES: EFFECTIVE APRIL 1, 2022

Benefit	Increase/Decrease	What is driving an increase?
Health	15% increase	<ul style="list-style-type: none"> • new life-changing and life-saving therapies can cost \$20,000-\$100,000 per person per year and up to \$1,000,000 per year; • mental health therapies • every dollar claimed impacts our premium rates
Dental	3% increase	<ul style="list-style-type: none"> • dental fees in Nova Scotia are increasing by 7% this year
Travel	20% decrease	
Basic Life	3.8% decrease	
Long Term Disability	5% increase	<ul style="list-style-type: none"> • higher number of disabilities, particularly musculoskeletal and cancer diagnoses • longer durations of disabilities
<i>Rates for benefits not listed in the above table remain the same for 2022-2023.</i>		

For information, visit Dalhousie's [Human Resources Website](#) or contact Dal HR Benefits office. You can also visit Medavie's websites for details on [optional critical illness coverage](#) and on [assured access](#). **DFA**

Dalhousie Pension Advisory Committee

Jonathan Shapiro (Law) and David Westwood (Health), DFA Representatives

The Pension Advisory Committee (PAC) has equal representation from the Dalhousie Board of Governors, DFA and NSGEU (Locals 99 and 77). PAC also comprises representatives from the Dalhousie Professional and Managerial Group (DPMG) which has voice but no vote (or veto over amendments to the plan) and the Association of Dalhousie Retirees and Pensioners (ADRP) which has voice but no vote.

Jonathan Shapiro (Law) and David Westwood (Health) are your representatives. Dr. Westwood joined as a DFA representative this year. The Committee was chaired by Jasmine Walsh, until her departure from the University in March 2022. Mr. Shapiro, who was the Vice-Chair, has taken up the role of Chair for the remainder of the year and will begin a two-year term as Chair on July 1, 2022.

The Dalhousie Pension Plan

Over the past 12 months the Plan has seen a remarkable recovery, despite some volatility in the markets from pandemic effects on the supply chain. The Plan has seen some of its strongest investment returns in many years over the last two quarters of 2021 and the first of 2022.

As of the last quarterly figures at the time of writing (December 31, 2021), the Plan was in a very strong funding position of 114.8% on a going-concern best estimate basis. Under the pension regulations, the Plan must be in a substantial overfunded position as a provision against adverse deviation. Currently, the Plan must be funded at a target rate of 107.7%. This means the Plan, at December 31, 2021, was funded at 106.6% of the requirement. Keep in mind, however, that these figures reflected the recovery of global markets from the pandemic, but do not take into account global affairs since the start of 2022, including further pandemic waves and the war in the Ukraine. We anticipate less growth in the early part of 2022, although we expect the Plan to remain fully-funded or close to it.

The Plan continues to be in a solvency deficit, though that deficit has shrunk considerably with the impressive growth of the Plan funds and the slow rise in annuity rates in 2021. The Plan is now in a place where it would not have “solvency concerns” by the government’s measures. In any event, while the solvency measure can be a useful tool to assess the health of some pension plans, the best analytic measure for our Plan is on a going-concern basis since the University will continue to operate for the foreseeable future, and the University enjoys full solvency relief from the provincial government.

Pension Valuation

The new regulations also permit plans with solvency relief (including the Dalhousie Plan) to file valuations every three years, rather than the current situation requiring annual valuations. The last valuation of the Plan was done on January 31, 2020, and is [available to all Plan members here](#).

The next Plan valuation does not need to be completed until January 2023, but the DFA representatives, along with those in the ADRP and the NSGEU have been pushing the Plan Administrator to conduct a

valuation earlier than that date. An earlier valuation would capture the current healthy state of the Plan, reduce costs of plan management, and enable the Trustees in the Pension Trust Fund to exercise their discretion to issue catch-up indexing if the valuation reflected a surplus in that fund. Catch-up indexing is especially important now given the rapid rise in inflation, which is reducing purchasing power for everyone, including retirees. The Board remains steadfast that they will not conduct an early valuation at this time because of concerns about market volatility, but your representatives continue to advocate for an earlier valuation that benefits all parties.

Ongoing Discussions About Integration of Enhanced Canada Pension Plan Benefits

As Members may be aware, in the last round of collective bargaining the DFA and the Board agreed in principle to “integrate” the new enhanced portion of the Canada Pension Plan (the CPP) with the Dalhousie Plan. The Government of Canada enacted changes to the CPP which require members and the University to pay more in CPP premiums, with an increase in retirement benefits. The Dalhousie Plan and the CPP are “stacked”, meaning that upon retirement members receive their full CPP and full Dalhousie Plan benefit, independent of each other. The Board and the DFA agreed in principle to integrate or “unstack” only the new enhanced portion of the CPP, such that members would see a slight decrease in their Dalhousie Plan benefit (with a corresponding slight reduction in contributions during active service) that would offset the enhanced CPP benefits, a kind of “net zero” so that total pension benefits remain the same as before the changes to the CPP. The details of this integration were delegated to PAC.

A sub-committee of PAC was struck and met repeatedly over the last year, with an aim to reach agreement on matters related to integration. However, as of the time of writing, no agreement has been reached and there are no further meetings scheduled. This issue may return to the collective bargaining table or be resolved in some other forum, or it may return to PAC. (Refer to a note about this matter in the Grievance Committee report.)

Continued Board Pressure to Cease Transfers and Move to One Fund

Dalhousie’s Pension Plan is composed of two trust funds: the Pension Trust Fund (PTF), and the Retirees’ Trust Fund (RTF). Pension contributions of active employees are held in the PTF until retirement when an amount equal to the commuted value of the defined pension is transferred to the RTF. This two-fund structure is unusual compared to almost any other defined benefit pension plan, but it is intentional. The amount transferred to the RTF depends to a considerable extent on the post-retirement interest assumption of 4.55% (PRIA). Because actual investment returns have generally, over time, exceeded PRIA, the net effect has been to create different funding levels in the two trust funds, with the PTF usually underfunded and the RTF usually in surplus. Discretionary indexing for retirees depends on the amount of surplus in the RTF.

The Board has long proposed the restructuring of the Plan by slowly merging the two funds, by a cessation of transfers from the PTF to the RTF, instead paying all future pensioners out of the PTF. This would create a single-fund plan into which active members would contribute and which would then pay

out pensions to retirees. This would mimic the structure of most other defined-benefit plans. Current retirees would continue to receive pensions out of the RTF.

One highly undesirable effect of the single-fund proposal would be to reduce the likelihood of discretionary catch-up indexing for retirees under the combined PTF for a lengthy period of time.

The DFA has been strongly opposed to such a change and it has not been agreed. However, in the last round of collective bargaining the Board and the DFA agreed to jointly pursue a study of the impact of cessation of transfers on indexation and retiree pension benefits. Commissioning that study was delegated to PAC. At this time, no progress has been made on this matter.

Your DFA representatives on PAC continue to oppose any proposed change that will negatively and unfairly impact the pension you will receive in retirement.

The Future

DFA members continue to contribute substantial amounts to the Plan. This year, as in the past, members will contribute about 8.06% of pensionable salary, up to a maximum pensionable salary of \$171,000. The Plan remains strong, at a time when good quality defined-benefit plans are increasingly rare. The Plan is in a healthy and fully-funded position, and it is as important as ever that we continue to protect it so that future retirees remain secure, especially as inflation continues to rise.

Our Pension Plan is a primary reason why the futures of current and retired Members are relatively secure and the plan is very attractive to prospective employees. Your PAC representatives continue to work to support the financial health and security of the Plan, and to protect it from changes that could jeopardize the long-term security of all DFA Members, both current and retired. **DFA**

Dalhousie Pension Trust Fund/Retirees' Trust Fund

Jonathan Shapiro (Law), DFA Nominee

I am your DFA representative on the Board of Trustees for both pension funds which make up the Dalhousie Pension Plan: the Pension Trust Fund (PTF) and the Retirees' Trust Fund (RTF). The Dalhousie Pension Plan is composed of these two funds. Active members pay into the PTF, and upon retirement funds are transferred to the RTF and retirees' benefits are paid out of the RTF. Each fund has a Board of Trustees responsible for the oversight of the management of that fund, although there is significant overlap between the trustees on the two boards.

New Trustee

For the last number of years, the DFA trustee has been Ronald A. Pink, Q.C. I have taken over that role from Mr. Pink effective January 1, 2022. This means that I have only had the opportunity to sit in on one

quarterly meeting, and therefore some of the information here lacks the historical context provided by Mr. Pink. I hope to continue to provide Members detailed information about the two funds in this report and in the future.

Fund Performance in 2021-2022

The market performance for both funds was almost at historic highs in 2020-2021 despite the ongoing pressures of the pandemic. Both global and domestic markets made remarkable recoveries, especially in international markets in the United States. The overall investment strategy of both funds is to remain highly diversified, with investments in equity markets both domestic and foreign, bond markets, and fixed assets like real estate and infrastructure. The goal is to ensure steady growth and investment returns in the long term, and to have the ability to ride out market volatility to ensure that the funds remain secure to provide for the pension promise made to retirees.

From January 1, 2021 to December 31, 2021, the overall returns for the Plan were outstanding: the PTF saw a one-year return of 18.94% (well exceeding the target benchmark of 6.30%) and the RTF saw a one-year return of 16.91% (well exceeding the target benchmark of 5.05%). These returns are anomalously high and Members should not expect that performance on an ongoing basis, but it is very good news in the short term for the health of the Plan.

Because of the remarkable returns seen in the markets in 2021, the estimated funding of the overall Plan was at 114.8% on a going concern basis (keeping in mind that the Plan must be funded to a 107.7% target to meet the statutorily mandated provision against adverse deviation).

Catch-up Indexing Status and Valuation of the Plan

There was no further exercise of Trustees' discretion to award catch-up indexation to retirees, because there has not been a recent valuation of the Plan which would establish a surplus from which to issue such indexation. The last valuation of the Plan was conducted on January 31, 2020. While the Plan is not required to conduct another valuation until January 31, 2023, it is open to the Board and the Plan Administrator to conduct a valuation earlier than that date. Until such time as a valuation is conducted, there is no actuarial surplus to be used for catch-up indexing. However, if the RTF continues to remain in (or close) to the current state of health, I anticipate there will be a surplus in the next valuation. The remaining missed indexation is still less than 7%, as it was at the last annual report.

New Asset Mix and Effect on the Plan

A new asset mix study was recently completed which examines and adjusts how the assets in both Plan funds are invested. These studies and adjustments happen every few years in order to ensure the best investment strategy for the two funds over the long term. Adjustments to the Plan investments as a result of the study will see slight decreases in investments in equities and slight increases in fixed assets. These changes are not anticipated to affect the returns in the two funds, but it will have the effect of reducing the provision for adverse deviation required by the Superintendent of Pensions. In the past,

the asset mix of the Plan required an overfunding provision of 7.07%, but that will be reduced with the new asset mix to 6.8%.

This will also be reflected in any future valuation of the Plan, which should also be reflected in the actuarial surplus.

Overall Value of the Plan Fund

At December 31, 2021, the overall market value of the PTF is \$914.8 million and the overall value of the RTF is \$901.7 million. This is a significant increase in value over the previous year, again due to remarkable returns in the markets.

The data in this report as of December 31, 2021 occurred before the current upheaval in the world, including additional pandemic waves in Canada and the conflict in the Ukraine. Markets have been very volatile in early 2022 with large drops and recoveries. Hopefully the markets will recover from that volatility, and the funds in both Plans diversity should, I hope, shelter it from some of that uncertainty.

I look forward to serving as your nominee and Trustee on both funds going forward. **DFA**

Association-Board Committee

Tim Jukes (Science) DFA Co-Chair, David Westwood (Health) DFA Nominee, Barbara MacLennan (DFA Professional Officer) DFA Nominee, Lynn Purves (DFA Administrative Officer) DFA Observer

The Association-Board Committee (ABC) considers matters of interpretation or application of the Collective Agreement. Agendas largely concern the administration of certain clauses of the Collective Agreement, including matters that would otherwise not be in compliance with the Collective Agreement and matters that require the approval of ABC as defined in the Collective Agreement. ABC also deals with issues of broad concern to our Membership. ABC operates by concurrent majority.

This year the Board representatives were Marlo Shinyei (Associate Director, Academic Staff Relations), Kim Brooks (Dean of Management), and Silvia Behrens-Kelleher (Interim Manager, Academic Staff Relations). Laura Neals (Co-Assistant Vice President, Human Resources (Acting)) returned as Board Co-Chair in March 2022. On the DFA side, our new Professional Officer, Jack Brown, joined ABC as an observer in April and will become a DFA nominee following Barbara MacLennan's retirement in June.

ABC meets monthly to deal with items such as waivers of advertising, extensions of limited-term appointments, spousal appointments, automatic renewals, special salary increases (SSIs), salaries above the maximum, administrative stipends and job descriptions, extensions to time-lines (e.g., anomalies fund, tenure limits), and parking fees. All meetings have continued to be held via Zoom.

ABC nominees also receive a monthly Academic Appointment Activity Report (AAAR) which lists all academic staff changes (appointments, promotions, tenure, sabbaticals, etc.) and provides supporting documentation. We query missing documentation and, on occasion, note that the Collective Agreement will be violated if a proposed action is taken. Such items are brought to ABC to be resolved.

Members who read this annual report carefully might notice some items in the list below have been discussed in past reports. Some items remain on ABC's Action List and minutes for extended periods either because discussion over issues extends over months, it can take frustratingly long for information requested to be provided, or items are put on hold for months because of COVID or the bargaining process. During this past year ABC added a number of 'follow-up' meetings a week or two after a regularly scheduled monthly meeting in order to reduce the swollen Action List.

Principles of Fair Consideration

This Board document includes a process that committees are expected to apply when assessing and comparing equity-seeking candidates (Principle 4). The DFA requested clarification and the Board nominees explained that the principle is to be applied at the short-list stage: (1) a candidate not belonging to any designated group needs to be substantially better qualified in comparison to candidates from equity-seeking groups, and (2) if all short-listed candidates belong to equity-seeking groups, the least represented group, defined based on labour market availability, in the unit will have preference. The DFA raised concerns about how short-listed candidates belonging to more than one equity-seeking group are to be assessed and whether committees are properly informed on applying this principle. ABC had a special meeting to discuss some case examples but were unable to agree on the application of Principle 4.

Committee Composition

A number of instances over the year led the DFA to raise the issue of whether Chairs, Directors, and Associate Deans should chair or be members of reappointment committees. The Board argued that smaller units often include all unit members and that different Faculties have different rules.

Travel Fund Carry Forward

In the spring of 2021, the Board agreed to waive the 10% carry-forward for 2021-2022 and the 30% carry-forward over three years provisions in the Collective Agreement. In 2022, with a large surplus in the travel fund, the Board had no interest in carrying over this surplus for another year, instead indicating they expected the parties to discuss during bargaining how to use this surplus for the joint benefit of the parties.

Intellectual Property Violations

The DFA drew the Board's attention to software that proponents claim can help monitor Intellectual Property violations of Members' copyright. The Board responded that a 'homemade solution' would be difficult to maintain but was interested in finding a different solution. We continue to wait for a response on this long-standing matter.

Joint Committee on Y-Values

In accordance with the Y-Value Letter of Understanding (Appendix XIV of our Collective Agreement) added to the current contract, the parties created the committee, which met over the fall and winter and is providing recommendations to ABC this spring on how non-traditional scholarship and traditional ways of knowing will be assessed and weighted when calculating Y-value and Years of Creditable Service.

Unpaid Leaves and Benefits

The parties have sought to clarify which benefits are available to Members when on unpaid leaves. Further, some benefits (e.g., the Health Spending Account) might be available in full if the Member is working on July 1, but expenses incurred when on an unpaid leave (e.g., in August) cannot be claimed.

Professional Development Allowance (PDA)

- The Board reported that Financial Services pointed to tax implications for why the PDA cannot be claimed over more than one financial year.
- Financial Services has a one-month 'grace period' in March for processing claims for purchases made up to the end of February. This added time is mostly to accommodate Faculty committee meetings and should not be seen by Members as an extension of their Faculty deadline for submitting their PDA claims.
- Goods purchased using PDA are the property of Dalhousie. This avoids them being a taxable benefit for Members.

Repeated Limited-term Positions

Whenever possible, the DFA has asked the Board whether a Department/Faculty has plans to make a long-filled limited-term appointment (LTA) position permanent and/or whether an LTA position can be made longer (e.g., multiple years rather than one year).

Vacation

- The Board's position, in accordance with the Collective Agreement, is that vacation is to be used during the year it is earned. Members must ask their Dean if they wish to carry forward some unused vacation to the subsequent year. The Board recognizes that in exceptional circumstances vacation might be paid out (e.g., sudden departure or retirement), but in practice they are reluctant to take such action.
- For Instructors on limited-term appointments of between 10 and 12 months, they can either take the vacation time or have the days paid out. This led to some confusion this year and required some communication and work for the DFA and Board.

Availability to Students

The ABC Co-Chairs sent a memo to Deans' Council regarding how to communicate to students that 'faculty availability' is not meant to suggest faculty are available to students at all times.

Student Feedback Outside the SRI/SLEQ Process

The DFA raised the issue of student-generated feedback, funnelled through a Chair, to a Member. This raised important issues about whether such feedback was appropriate given the Collective Agreement's requirement that feedback be via Faculty/Senate approved instruments.

Working On- and Off-Campus

The DFA raised the issue of Members in one Faculty being required to be in their office every day. This led to discussion with the Dean and Director.

DFA Link in Offer of Appointment Letters

The DFA requested that a link to the DFA be included in offer letters sent to new hires to allow new Members to consult with the DFA if they wished. The Board rejected this idea, to which the DFA was "incredibly surprised". Such a link could aid in retaining new faculty. The Board said departments should establish their own procedures. The DFA encourages Members to draw candidates' attention to the DFA and the Collective Agreement during the interview process.

Leave for Senior Instructors Becoming UTFs

Senior Instructors who need to submit their application for promotion to University Teaching Fellow in the fall term might be eligible for a leave the following July 1. These leave applications are due before the Member learns whether the promotion has been approved, which raises the issue of whether to apply for an Educational or a Sabbatical Leave. This might also have implications for which fund to apply to for supplemental leave grants. This matter continues to be discussed at ABC.

Extension of Time Limits for Tenure and Promotion Letters

A number of requests were made to ABC to approve extension of the time limits set for Chairs/Directors and/or Deans to provide their letters regarding tenure and promotion files. Delays in this process lead to domino effects through the levels of approval and are stressful for the candidates who are waiting. Though ABC cannot deny such requests, the DFA has made clear that such delays need justification and steps should be taken to ensure the process begins early and moves forward in a timely manner.

Daycare on Agriculture Campus

This item has been on the Action List for some time. ABC was recently updated, and there might be some progress on this item underway, which is very encouraging.

Inequities and Special Salary Increases

ABC approves a limited number of Special Salary Increases each year. The DFA has requested data on the past 10 years of awards to assess whether there are any inequities in how these are distributed.

Pay Equity

Ahead of bargaining, the DFA has requested data on a number of topics to evaluate pay equity. The Board is processing the request.

DFA

Dalhousie Environmental Health & Safety Committee

*Mark Obrovac (Science), Emanuel Jannasch (Architecture and Planning), and Alex Speed (FASS) - Halifax;
Margaret Hartling (Agriculture) and Paul McNeil (Agriculture) - Truro*

Halifax

No report was available at the time DFA Dialogue was distributed.

Truro

- Met monthly except during the summer hiatus
- Dealt with incident investigations as needed
- Members attended an OHS Committee training in April 2021
- Still dealing with issues related to Cox fire – Greenhouse glass repair
- Air sampling and testing in preparation for in-person classes
- Shortage of N95 masks and alternatives
- Set up a First Aid training system within extended learning
- Pedestrian crosswalks reviewed and assessed
- Transportation of Dangerous Goods training reviewed
- Fume hood repairs Haley – ongoing

DFA

Dalhousie Transportation & Security Committee

Sherry Huybers (Health), DFA Representative

The Transportation and Security Committee meets monthly from September to June. Membership is composed of voting representatives from all unions and prominent bodies on all campuses, including the DFA, NSGEU (Local 77 and Local 99), Dalhousie Professional and Managerial Group (DPMG), Dalhousie Student Union, and Senate. Non-voting members include the Director of Security Services, the Traffic Officer, the Facilities Communications Officer, and the Office of Sustainability. The current co-chairs of the committee are Peter Jones (Sexton Campus) and Theresa Myra (DPMG). [Minutes for the monthly meetings are posted here.](#)

Parking Rates

The parking rates for 2021-2022 were discussed at the June 2020 Transportation and Security Committee meeting. The committee discussed the recommended increase based on the income statement. With the statement showing a \$550,000 deficit in parking revenue and parking fees not having been increased in three years, the committee voted unanimously to increase the reserved and general parking permit fees by half a percent (0.5%). These rates were in accordance with the DFA Collective Agreement Clause 32.10.

Parking rates for 2022-2023 will be presented and discussed at the May and June 2022 Transportation and Security committee meetings. [Click here for further information regarding parking.](#)

Parking/Transportation

The number of parking permits sold for 2021-2022 reached 2/3rd capacity, compared to 2019 pre-COVID. A greater number of student permits were sold.

For 2021-2022, the Hot Spot Parking spots, which are paid through an app, were rolled out in September. Parking meters and Pay and Display are still available as of the writing of this report, however, these will also be changed to Hot Spot Parking. Permits and parking will be changed to Hot Spot parking with August 15 the target date for the change-over. With Hot Spot, permit tags will not be needed. Electronic permits will be created when vehicles are registered. Security Officers will verify permits by scanning or taking a picture of vehicle license plates with a mobile device.

In fall 2021, there were 1,974 parking spaces for all of the Halifax campuses and 766 spaces for the Agricultural campus.

As part of the Event Centre Arena construction, the tennis courts area will be turned into a parking area. This work will replace the spots that will be eliminated by the footprint of the arena itself.

Parking use data reflected a decrease of 10-22% (in certain categories) from pre-pandemic years due to flexible hybrid work schedule.

The number of parking tickets issued and vehicles immobilized are down about 50% from 2019-2020 pre-pandemic levels. Overall, there are fewer vehicles parking on campus as remote work continues.

Employee Bus Pass (E-Pass) for March 2022 had 250 people registered for the program, which is down by 100 compared to the previous registration.

Security

There's been a steady return to normal activity levels of people on campus. Pedestrian numbers on campus have returned to normal.

There has been a gradual increase in reportable incidents as people return to campus. Metrics show numbers are rising to pre-pandemic levels again. One exception to this is the alcohol/drug related first-aid calls which have decreased by approximately 50% from 2019-2020 levels. This is due to the reduced student resident numbers which are down from 2,300 to 1,800. **DFA**

President's Advisory Committee on Sexualized Violence

Catrina Brown (Health) and Sheila Wildeman (Law), DFA Representatives

The President's Advisory Committee on Sexualized Violence is responsible for working through, and with, the Human Rights and Equity Services office to provide advice on the strategic planning, implementation, monitoring and evaluation of the Sexualized Violence Policy and the University's Sexualized Violence Prevention and Response Strategy. The purpose of the strategy is:

- to prevent sexualized violence by indicating the seriousness with which the University views and responds to this issue;
- to be educational, in that its existence will increase awareness of the impacts of sexualized violence and of options, resources and services available to those who have experienced sexualized violence and members of the University community generally; and
- to provide timely, coordinated, consistent and fair response to disclosures and reports of sexualized violence.

The Committee met twice this year and has committed to a process of study focused on key issues in preparation for the scheduled review of the policy in 2024. [Info about the policy can be found here.](#)

Dalhousie Council on Employment Equity

Gabriella Mosquera (Computer Science), DFA Representative

The Employment Equity Council meets four times each year to discuss issues related to work with Human Rights and Equity Services to provide advice on planning, implementing, monitoring, and evaluating Dalhousie's Employment Equity Policy, its Employment Equity Plan, and relevant policies.

In fall 2021, the Employment Equity Council reviewed the results from the Talent Pathways program, a temporary staffing services program, provided by Human Resources, meant to help Faculties and Administrative departments provide employment opportunities for underrepresented groups and others experiencing barriers to employment, through short-term and temporary vacant positions that may lead to a more permanent placement. Of the 90 temporary contracts offered between 2018 and 2021, 16% of hires secured a permanent position at Dalhousie.

Additionally, the Council has been having on-going discussions about Dalhousie's Indigenous Self-Identification Policy and its Employment Equity Policy, in an effort to ensure significant improvements in recruiting Black and Indigenous faculty and staff. Particularly, the Council is focusing on recruiting and retaining African Nova Scotian and Mi'kmaw faculty and staff. At the moment, there are no set deadlines for updates on these policies.

DFA

DFA Equity Committee

Remi Agu (Health) Chair, Heather Andreas (FASS), Catrina Brown (Health), Eli Manning (Health), Ifeyinwa Mbakogu (Health), Raghav Sampangi (Computer Science), Tara Perrot (Science, DFA President, ex-officio), and Catherine Wall (DFA Communications Officer, ex-officio)

At the beginning of the 2021-2022 academic year, the DFA Equity Committee mapped out objectives to be pursued during the year, including:

- updating the Equity Committee's Terms of Reference;
- expanding the committee's membership;
- identifying current University equity-related policies, guidelines, and model clauses needing DFA's representation and input;
- exploring ways to coordinate with other equity-advancing groups or committees in the University;
- identifying actionable equity issues for potential inclusion in the next round of collective bargaining; and
- tackling other issues to be identified by committee members.

The committee agreed that one of the best ways to be impactful was to prepare an action document with equity, diversity, inclusion, and accessibility (EDIA) issues vital to our members. This document would identify key EDIA issues and develop strategies for addressing them. In addition, the committee recognized the need to have a reference document for future committees. DFA Equity Committee members and the READI Group, an advocacy group at Dalhousie that focuses on aspects of inclusion and wellness at the University, contributed to the document. *(The action document is summarized below.)*

The DFA President, Dr. Tara Perrot, recognized the sense of powerlessness and, eventually, despondence from many Equity meetings with little action. She accepted to take critical issues identified by the Equity Committee to the DFA Executive Committee.

Suggestions for New Initiatives

- DFA participation in new-faculty initiation. The DFA Executive or the Equity Committee may facilitate University caucuses' introduction during the initiation, which may help new faculty find support on campus that they may not see in their departments, units, or schools.
- Encourage Dalhousie to develop a University-wide faculty mentoring program. Many schools and departments have mentors from within their unit, but this may not meet the needs of a person from an equity-seeking group. A University-wide program may fill this gap.
- A need for policy around access to equipment/facilities on campus. New racialized colleagues often struggle to get access to equipment for their research. Although needed pieces of equipment are

highlighted as being available and accessible to support their research during academic position interviews, access becomes difficult once the candidates arrive on campus.

- Pooling unused Health Spending Accounts for faculty with disabilities and their families.
- Requesting resources and timelines for accessing accommodations for faculty (or compensation to work without necessary accommodations).
- Advancing equity-based arguments for Anomalies Fund applications.
- Additional and specific funding for faculty development for Indigenizing and decolonizing professional and pedagogical development and Universal Design for Learning and Culturally Responsive Pedagogy.
- Diversifying the Professional Development Allowance to help DFA Members cushion the excessive demand for their funding and time to meet work-from-home expectations during the pandemic.

Teaching and Student Assessment

The committee has strong opinions about the recently approved Holistic Evaluation of Teaching Policy Document and the Student Learning Experience Questionnaires (SLEQ). According to the VP's office document entitled Holistic Evaluation of Teaching Policy Document: "The primary purpose of evaluating teaching at Dalhousie is the developmental support for instructors to improve teaching and to learn across the campus. A holistic approach to evaluating teaching will also play an important role in reviewing teaching effectiveness at appointment, reappointment, tenure, and promotion".

Racism, discrimination, and other biases can affect teaching evaluation. This is true for students and peer assessments. For the policy to be holistic, it should also address how these variables possibly affect a faculty member's career progress and how their potential adverse effects can be reduced or eliminated. What are the provisions in the policy for bias training for unit and faculty-level tenure and promotion committee members? Who will be responsible for developing and delivering the content? How will the EDIA content and delivery effectiveness be evaluated? Asking students to weigh in on the diversity of course content is problematic. It could negatively impact instructors trying to include EDIA concepts in their courses. Changing the 'opt in' to an 'opt out' for sharing SRI/SLEQ results with students may also harm designated group members if they choose to opt-out. How exactly will 'discriminatory comments' from students be dealt with?

Peer evaluation is tricky when it comes to teaching evaluation. Who decides on the peer? A peer can be one's close associate in a department or a random faculty member from the same unit with a potentially hidden agenda or concealed dislike for the candidate. What aspects of a candidate's teaching peer assessment have more weighting – content, delivery style, students' grasp of topics, etc.? Should the peer be a content expert? Answering these questions and many others is in sync with promoting the [Dalhousie University's Diversity and Inclusiveness Strategy](#). Hiring and retention are both sides of the same coin.

The committee suggested significantly addressing the issues identified above, among other matters, or suspending the use of SLEQs.

Employment Contracts and Workload

- Developing a recruitment and retention policy for equity-seeking and Indigenous faculty and staff.
- Clarification regarding Boyer model for tenure and promotion - need to include service work differently.
- Workload issues - extra ongoing work that is not compensated, acknowledged or valued.
- Excessive workload based on committee work and teaching load for equity-seeking group members. There is a need to balance productivity and wellness.
- Intensify negotiations with the University to abandon the 10-month appointments. This is an unfair practice because faculty members work on teaching development in the remaining two months of the year without income and health insurance coverage.

Other Concerns and Potential Solutions

- No follow-up, no action

Challenge: Dalhousie and Dalhousie Faculties/Departments promote EDIA but do not implement identified changes necessary for an inclusive work culture. Several reports have been written, including one report with recommendations shared in 1988.

Potential solution: Share a message of commitment and begin implementing changes at the grass-roots level.

- No accountability

Challenge: No central equity manager to hold accountable for de-centralized initiatives in each Faculty/Department.

Potential solutions:

- a) Hire an equity manager, or a team of equity managers, stated in one of Dal's approved policies.
- b) Provide support to the equity manager to implement changes in processes.

- Clarification on procedures for initiating audits for Faculty/Departments based on EDIA-related complaints

Challenge: If members report concerns to Human Rights and Equity Services, it is usually an indication of a toxic workplace culture within the Faculty/Department. Even though these issues

may be resolved individually, sometimes with no equitable solution for the aggrieved, the Faculty/Departments only get reviewed every five years. Such unfair processes or lack of clarity in processes lead to individuals leaving the University and not feeling comfortable speaking up, further perpetuating such toxic practices.

Potential solutions:

- a) implement better workflows and processes to initiate audits for Faculty/Departments based on EDIA-related complaints.
 - b) Connect this with the equity manager workflows.
 - c) There should be a response to complaints within a specific short time frame, with clearly identified concerns and actions.
- Support for Faculty and staff who experience professional retaliation due to complaints

Challenge: There are situations where faculty and staff who speak up and report EDIA issues and challenges experience professional retaliation or threats of professional retribution, especially if the concern or complaint is about someone in a position of power. This leads individuals to not speak up or walk away from the work context, further perpetuating the toxic work culture.

Potential solution: We do not have a specific solution for this challenge because it is, in a way, covered by the other solutions. But it shows a lack of clarity about what to do when someone has concerns of this type.

Moving Forward Strategies

The DFA Equity Committee is a subcommittee of the DFA Executive Committee and our role is to suggest best practices and ideas to the Executive. The Executive either moves on our suggestions or rejects them. Before this action document, there was no repository or reference document for the Executive to work with to bring about changes, especially during collective bargaining.

The action document is a "work-in-progress" and will constantly be updated, and the issues raised regularly presented to the Executive. It is essential to maintain the precedence set by the current DFA President, Dr. Tara Perrot, to attend the Equity Committee meetings. She identified the need to strengthen the link between the DFA Equity and the Communication Co-ordination Committees for Public Speaker Series topics. These events focus on member research/issues of interest to the public outside the Dalhousie community. Many opportunities exist to bring up equity issues or highlight our members' EDIA needs and struggles. This approach not only highlights our problems to the broader community but may grab the University's attention because of the public relations component of this strategy.

Finally, having the EDIA needs of our members in one document enables us to track our progress - monitor things that have been done, and come up with a list of how to implement other recommendations and new initiatives. These recommendations can be built into our Collective Agreements as needed and feasible. We can consider this with the Office of the VP of Equity and Inclusion, which may be productive as both the DFA and the Administration are vested in advancing the EDIA strategic initiatives of Dalhousie.

Conclusion

One of the biggest challenges we see in the University about EDIA matters is the inefficient implementation of recommendations. A starting point for this could be establishing a joint task force including the new Assistant VP for Equity and Inclusion and the VP of Equity and Inclusion. The DFA should also be a part of any University-wide EDIA committee and be consulted on significant EDIA-related policy changes and implementations (e.g., Dalhousie Employment Equity Plan). Collaboration between the DFA and the Administration on solving EDIA problems may make policy implementations in this area more efficient. However, the will to implement these changes and the grass-roots acceptance of many proposed recommendations are significant obstacles.

DFA

DFA Communications Co-ordination Committee

Amy Birchall (Agriculture) Chair, Jason Brown (Science), Erin MacPherson (Libraries), Tara Perrot (Science, DFA President, ex-officio), and Catherine Wall (DFA Communications Officer, ex-officio)

This committee has had some quiet time during COVID due to several factors, but activities are slowly starting to resume.

There have still been some activities that have taken place including the Robert S. Rodger Lecture series, the Being a Black Professor at Dalhousie panel, a survey to our members regarding communications, the redesign of the DFA website, and the launch of WeAreDal.ca as a public-oriented site.

The Robert S. Rodger Lecture series saw UMFA President Orvie Dingwall sharing her experiences with bargaining, mobilizing members, and carrying out job action during the pandemic in 2021. CAUT President Brenda Austin-Smith joined the lecture from the picket lines in Church Point as Faculty at the Université Sainte-Anne entered their 5th week of strike action.

This presentation truly laid bare this country's current bargaining situation for post-secondary education. The session was recorded and is posted to the DFA website. We would recommend watching it if you did not have the chance to attend.

Our survey regarding communication that was released in June 2021 resulted in responses from nearly 400 members. This feedback will help us tweak our communications tools so we can reach our members

that much better. Thank you to our membership for engaging in this project and providing us with this valuable information.

The Being a Black Professor at Dalhousie was held in May 11 as part of our public DFA Public Speaker Series. More than 75 people attended from Dalhousie and the broader post-secondary community. This series had to take a brief rest period during COVID and we are excited to see it returning. Please expect to hear more from us regarding these events!

We are very excited about our streamlined DFA website. Our new WeAreDal.ca public-oriented site features Member profiles and other information of interest to those outside the DFA membership. If you have not looked at these just yet, please make sure to! Both were launched in December 2021.

I would like to take a moment, as committee chair, to recognize the effort of our members during what has been a challenging time. The hard work and dedication of everyone has kept communications flowing and this has helped with keeping us all connected.

My very special thanks go to Catherine Wall, Communications Officer for the DFA. She has truly kept us working toward a goal and a vision. Without her, this committee would not be moving in the direction it has been.

The start of a 'new normal' will see a return of previous Communications Co-ordination Committee activities and I am very excited to see this time coming. Communication is about so much more than just an email notification or a survey, it is about connections. These connections create our community.

Expect to see more communications that bring our community together coming very soon! **DFA**

DFA Indigenous Caucus Committee

Patti Doyle-Bedwell (Open Learning and Career Development) Chair, Naomi Metallic (Law), Lisa Binkley (History), Gail Baikie (Social Work), Amy Bombay (Nursing), Jonathan Ferrier (Biology), Julie Marcoux (Killam Library), Debbie Martin (Health), Curtis Michael (Indigenous Studies), Eric Oliver (Oceanography), Sherry Pictou (Law and Management), Margaret Robinson (Indigenous Studies), Cheryl Simon (Law), Brent Young (Medicine), Tara Perrot (Science, DFA President, ex-officio), Catherine Wall (DFA Communications officer, ex-officio)

Note: In March 2022, the DFA Executive Committee approved a name change for this committee, previously called the DFA Aboriginal Caucus Committee. It is now called the DFA Indigenous Caucus Committee.

Kwe, Hello DFA! Dalhousie Indigenous Faculty Caucus came together a few years ago under the leadership of Professor Nancy MacDonald. Indigenous faculty members felt the need to organize to

advance common issues we face at Dalhousie. Since the first meeting, we have seen many changes occur at Dalhousie with respect to Indigenous issues.

Our numbers have grown in the past five years. Currently our Indigenous members are:

Naomi Metallic (Law), Lisa Binkley (History), Gail Blaikie (Social Work), Debbie Martin (Health), Amy Bombay (Nursing), Margaret Robinson (Indigenous Studies), Julie Marcoux (Killam Library), Eric Oliver (Oceanography), Jonathan Ferrier (Biology), Sherry Pictou (Law and Management), Cheryl Simon (Law), Curtis Michael (Indigenous Studies), Brent Young (Medicine), and Patti Doyle-Bedwell (Indigenous Faculty Caucus Chair; member of the DFA Executive, Bargaining Team and Grievance Committee; and member of Senate representing the Indigenous Advisory Council.)

Key issues discussed this year include the nation-to-nation relationship, Indigenous faculty workload, and Indigenous knowledge.

Nation-to-Nation Relationship

Mi'kmaq people have a treaty relationship with the Crown, recognized by s.35 of the Constitution Act 1982. While the Employment Equity Act includes Indigenous peoples, the status of our relationship with the Crown requires a recognition of the nation-to-nation relationship. To that end, in the last five years, Dalhousie, in partnership with the Indigenous faculty and staff, established an Indigenous Advisory Council. In response to the Truth and Reconciliation Committee (TRC) Calls to Action and the U-15 Principles of Indigenous Education, Dalhousie formed the Indigenous Strategy Committee. The Board of Governors and Senate approved in principle the TRC Calls to Action and the Principles. Once the committee completed the strategy, the co-chairs presented it to Senate and the Board. Both the Senate and the Board approved the Indigenous strategy. The TRC Calls to Action, the principles and the strategy document offers direction to the University in terms of teaching, curriculum development and advancing the nation-to-nation relationship with the Mi'kmaq people as well as all Indigenous peoples at Dalhousie.

Indigenous Faculty Workload

In February 2022, I attended three conferences on Indigenous Identity. This issue has become very controversial at other universities. In our discussion, we outlined our responsibilities such as scholarly activities, research and teaching as well as mentoring students, serving on committees, and maintaining our connections to our cultures, languages and families. As noted by Justice Murray Sinclair, our responsibilities resolve around kinship, community and family.

Indigenous Knowledge

This year, we spent significant time discussing Clause 17.17 of the DFA Collective Agreement.

17.17 - All research, scholarly, artistic and/or professional activity conducted by Members in the course of their duties shall have as its primary objectives the increase of knowledge and understanding, artistic creation, the improvement of the scholarly or

professional competence of the Member as a member of the academic staff of the University, and the improvement of teaching. When research, scholarly, artistic and/or professional activities are reviewed and assessed in relation to reappointment, tenure, promotion, or salary increases, they shall be assessed in relation to these primary objectives. Such review and assessment shall likewise take due account of the quality and not merely the quantity of such activities. **In keeping with the Boyer model, scholarship includes the scholarship of discovery, the scholarship of integration, the scholarship of application and/or the scholarship of teaching. Review and assessment of scholarship should recognize non-traditional forms of scholarship and traditional ways of knowing.**

Indigenous faculty work with their communities in research and often include Indigenous knowledge in their scholarly works. Having this recognized in the Collective Agreement has been a significant step. Including Indigenous knowledge means respecting protocols of the Indigenous community, recognizing the value of oral tradition and ensuring community members receive credit for the work done. Traditional ways of knowing could include stories, spirituality, language, and culture. Murdena and Albert Marshall developed the term “two-eyed seeing” to incorporate the need to understand both worlds, Western and Mi’kmaq. How Indigenous scholars use their Indigenous knowledge in terms of scholarship, teaching and research will continue to be discussed. Mi’kmaq culture, language, spirituality and community form the foundation for Mi’kmaq scholarship. In April, I attended a conference, sponsored by Dr. Marie Battiste, on “Indigenous Knowledge in the Academy” exploring ways to include our traditional knowledge in carrying out our responsibilities as scholars and community members.

As Patricia Monture used to tell me, we must walk in both worlds. How to assess these responsibilities in terms of tenure and promotion often has been difficult. Managing workload with these extra expectations, both from the University and community can be challenging. In our discussions of workload, the DFA has been extremely supportive as we move through these issues. I am heartened by the fact that DFA recognizes these issues whereas 20 years ago, the mainstream institutions did not acknowledge our community responsibilities.

In keeping with the recognition of Indigenous knowledge, I participated in a DFA/HR committee to develop processes to recognize Indigenous traditional ways of knowing in the hiring processes. In other words, how do we calculate y and e values when assessing Indigenous knowledge. We have developed a draft proposal.

In the past year, many of our members also worked closely with the Indigenous Advisory Council. Our focus this year has been the implementation of the Indigenous Strategy. In October 2022, we held a retreat in Debert to review the plan and develop plans to implement key issues. Dr. Brent Young, Professor Naomi Metallic and I met with the Provost and Vice Provost Human Rights and Equity to present our priorities.

We also worked with the Senate to develop a new Mi'kmaq Land acknowledgement. Senate presented the new land acknowledgement at the last Senate meeting on May 9, 2022, which passed.

This past year, FASS hired Professor Curtis Michael, to teach two courses on Mi'kmaw language. This is the first time Dal has hired an expert to teach the language at Dalhousie for credit.

I am encouraged by the number of Indigenous faculty members at Dalhousie. As a Mi'kmaq woman, I began my academic career at Dalhousie as the only full-time Indigenous faculty member. Twenty-five years later, we have begun to develop a critical mass of Indigenous scholars. The recognition and advancement of key issues facing Indigenous faculty could only happen with the work of all members of the Indigenous Faculty Caucus. Thank you to my friends and colleagues for standing strong and speaking truth to power. Welalioq. **DFA**

Southern African Student Education Project

Gary Kynoch (History) Chair, Theresa Ulicki (FASS), Matthew Schnurr (FASS), and David Black (FASS)

OVERVIEW

SASEP Purpose

From its inception, the purpose of the then South (now Southern) African Student Education Project (SASEP) has been to contribute to the development of South Africa by offering black South Africans – a historically disadvantaged group – a full scholarship to pursue graduate studies at the Master's or PhD level at Dalhousie University. This is now extended to students in the Southern African region.

History

SASEP has been operating at Dalhousie since 1987. Initially, the South African Education Trust Fund (SAETF) in Ottawa matched all funds which SASEP raised. Once SAETF ceased operating in 1993, Dalhousie assumed full responsibility for the project and SASEP has been completely funded by the Dalhousie community ever since.

The DFA contributes \$10,000 to SASEP each year. The Dalhousie Student Union contributes annually \$1 for each full-time student at Dalhousie, as the result of an agreement in the spring of 1990. Contributions are also made by individual faculty and staff members.

SASEP is further supported by the Administration. First, the Administration has agreed to waive international student differential fees for SASEP students on an ongoing basis. Second, the SASEP Advisory Committee, made up of DFA faculty members who all share an interest in Southern Africa, provides administrative and academic support to the project.

SASEP covers the entire cost of student placements, including tuition, round-trip airfare, a monthly stipend for living expenses, medical coverage and an allowance for a laptop, books and warm clothing. The number of placements available is entirely dependent on fundraising efforts, and the length of academic study of scholarship recipients. As of April 2022, a total of 18 students have been awarded graduate degrees under SASEP. The most recent being Liandrah Gapare from Zimbabwe, who completed the MSc program in Chemistry in summer 2021 and began a PhD (not funded by SASEP) at Dalhousie in fall 2021.

SASEP would normally have recruited a student for the academic year 2021-2022; however, due to the COVID-19 pandemic and the uncertainty of students being able to come to Dalhousie from Southern Africa, SASEP delayed its recruitment. We recruited two students this year, Zimbabweans Muzomkhulu Ncube and Laura Jele, both to begin MEng degrees in Civil Engineering in the fall semester.

CURRENT ACTIVITIES

Administration

As of 2019-2020, SASEP funds started being administered by both Faculty of Graduate Studies (FGS) and the Department in which the student is studying. Previously, FGS handled the finances; however, it did not feel it had the administrative capacity to continue with this model. FGS administers routine finances, such as tuition, while Departments handle airfare, visas, rent and any other costs. Recruitment, selection and all academic matters are handled by the SASEP Advisory Committee, currently chaired by Gary Kynoch.

Recruitment

SASEP is open to eligible candidates from historically disadvantaged groups who are citizens of the Commonwealth countries of Southern Africa (South Africa, Botswana, Lesotho, Malawi, Mozambique, Namibia, Swaziland, Zambia, Zimbabwe).

We are very grateful for the support that DFA, DSU, and individual faculty and students have provided to this program over the course of many years. It is a tangible manifestation of internationalisation that underscores the strengths and outlook of the Dalhousie community. We hope that this community will continue to support SASEP as it adapts to the changing needs of Southern Africa, and contributes (in however limited a way) to the development of intellectual leaders in a region with exceptional potential but extraordinary challenges.

DFA

WUSC Student Refugee Program

Isaac Saney (Open Learning and Career Development), WUSC Student Committee Chair, Halifax and Joy Galloway-Jones (Agriculture), WUSC Faculty Advisor, Truro

Halifax

No report was available at the time DFA Dialogue was distributed.

Truro

We once again were able to welcome another student from South Sudan. Jacob jumped right into campus life, becoming a star on the AC Rams Soccer Team and making friends. As with all World University Service of Canada (WUSC) students, once they get settled here, they are able to imagine the possibilities. We are not sure where Jacob will end up, or which program he will embrace, but we are happy to have welcomed him to his new home. The Truro WUSC committee is busy working on our next SRP, and appreciate the continued support of the DFA. To be continued...hopefully, for many years to come!

Note: In 2021-2022, the DFA contributed \$16,630 to support WUSC students in Truro. Our contribution pays for students' accommodations (residence fees or rent)

DFA

2022-2023 DFA Executive Committee

Congratulations to the 2022-2023 DFA Executive Committee. The following DFA Members assume their positions immediately following the AGM on May 19, 2022.

President	David Westwood (Health and Human Performance)
President-Elect	Mark Lewis (Law Library)
Second Vice-President	Catrina Brown (Social Work)
Secretary	Amy Birchall (Animal Science and Aquaculture)
Treasurer	Dominic Silvio (Killam Library)
Past-President	Tara Perrot (Psychology and Neuroscience)
Members-at-Large	<i>(term ending April 2023)</i> <ul style="list-style-type: none">• Remi Agu (Pharmacy)• Philip Bennett (Physics and Atmospheric Science)• Patti Doyle-Bedwell (Open Learning and Career Development)• Vincent Masse (French) *• Gabriella Mosquera (Computer Science)

* Vincent will be a Member-at-Large for one year, filling a position held by Dominic Silvio, now Treasurer.

Members-at-Large	<i>(term ending April 2024)</i> <ul style="list-style-type: none">• Raluca Bejan (Social Work)• Andrew Brown (English)• Katherine Fierlbeck (Political Science)• Derek Kimmerly (Health and Human Performance)• Marc Whelan (Chemistry)
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The Non-Bargaining Unit Member position is vacant.

Thank you to our 2021-2022 Executive Committee Members for your dedication to our Membership and our Association. Your time, thoughtful contribution and commitment is appreciated. Our outgoing Executive Members include: Sarah Jane Dooley (Sexton Library), Shannon Lin (Rowe School of Business), and Matthew Numer (Health and Human Performance)

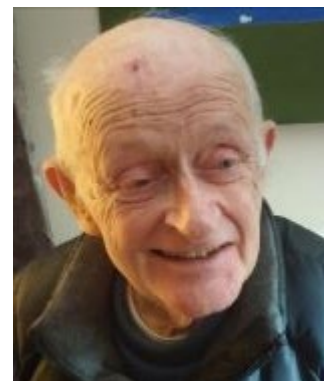
DFA

Nominating Committee for the 2022-2023 DFA Executive Committee

- David Westwood (Health and Human Performance), Chair
- Tim Juckes (Psychology and Neuroscience)
- Tara Perrot (Psychology and Neuroscience)

CAUT Dedicated Service Award

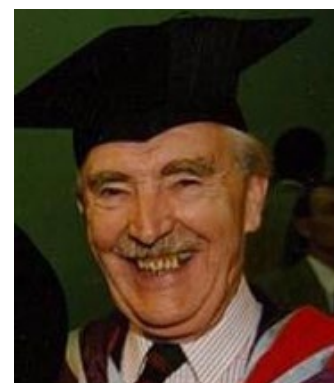
In recognition of outstanding contribution to our Association, the DFA nominated Dr. Paul Huber and Dr. Robert “Bob” Rodger for the CAUT Dedicated Service Award. Paul and Bob both passed away in 2021. Their families are delighted that this honour was bestowed on their loved ones, recognizing their dedication many years ago and the path they carved for present and future members of the DFA.



Dr. Paul Huber

DFA President 1972-1973

Paul supported the DFA for decades, protecting our pension plan while a Member and in retirement.



Dr. Robert “Bob” Rodger

DFA President 1978-1979

Bob led the DFA certification drive in 1978 and was instrumental in drafting our first Collective Agreement.

Celebrating 33 Years of Service!

Barbara MacLennan Retires from the DFA



Barbara joined the DFA in January 1989 as the DFA's Professional Officer. While her many contributions over the past 33 years of service are impossible to list in full, here are a few of the highlights.

- worked with 25 different presidents (*a few presidents served more than one term*)
- was a member of the DFA Bargaining Team, helping to negotiate 10 Collective Agreements
- devoted countless hours to meeting with Members, providing advice and support on an expansive range of issues, all 'behind the scenes'
- conducted annual orientation sessions for DFA Executive
- was a nominee to the Association-Board Committee for her entire career at the DFA
- supported countless grievance procedures, both informal and formal
- authored *Under the Microscope: Tenure, Promotion and Reappointment*
- authored *Laying the Foundation: Beginning Your Tenure Stream Appointment at Dalhousie*
- developed the *Working at Dal* handbook series for professors, instructors, librarians and counsellors
- presented Tenure and Promotion workshops for our Members for more than 15 years

Barbara is the enduring presence that drives and defines the Association. No one speaks more passionately and forcefully for our Members and their issues than Barbara. No one knows more about the DFA's Collective Agreement, or has played such a key role in shaping its evolution over their career. No one has done more to counsel, protect and defend our Members.

Thank you, Barbara, for your commitment and dedication. You will truly be missed. May your retirement be restful, fulfilling and everything you imagined it would be. **DFA**